

**Phoenix Program  
Process Definition – Project Costing**

Process	<b><i>Perform Project Balance Inquiry</i></b>
Process Number	<b><i>PC - 008</i></b>

***Description of Process***

The Project Balance Inquiry panel was created to reproduce the functionality provided by the “HD Screen” in legacy accounting system. This inquiry panel provides various balance amounts for a project by fund source and by Engineering vs. Contract. The amounts provided on the panel are the Allotment amount, the Unearned amount, the Earned amount, and the project balance. These amounts represent the same amounts conceptually that they did in the legacy accounting system. However, it is important that the users of this panel understand the Analysis Groups and Analysis Types within PeopleSoft Project Costing in order to interpret the underlying data that make up these amounts.

***Input to Process***

N/A

***Output of Process***

N/A

***Service Level Agreement Required? (if yes, provide a brief description)***

N/A

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### *PeopleSoft Panel Groups being Used*

Function	Panel Group
Go	Go – Manage Projects – Analyze Projects. This navigates to the menu group use to perform the project balance inquiry.
Inquire	Inquire – Project Balance. This inquiry panel for the project balance inquiry.

### *Business Process Description*

Process Description	Responsibility (Agency/Centralized)
<b>Step 1: Enter the Project Inquiry Panel</b> Select the Business Unit for your inquiry (DOT = '48400').	Agency
<b>Step 2: Select the Project</b> Enter the project number or select it from the drop down list. A partial project search can be performed by entering the first few characters of the project and then selecting <Shift + F4>. Tab out of the project field; the project data will be retrieved. Repeat this step to analyze other projects.	Agency

### *Forms Used with Process (#)*

N/A

### *Process Flow Diagram (if appropriate):*

N/A

## APPROVAL FORM

SIGNER	ROLE	APV	NOT APV	DATE
Jamie Simpson	DOAS Project Lead			
Dan Youngblood	THG Project Lead			